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GENERAL RESPONSIBILITIES OF PLANNING OFFICER



STAT

FIVE YEAR PLAN

- Prepared annually during the last quarter of the fiscal year at the request of the DDA.
- Due to the DDA about mid-October of the new fiscal year.
- Based on goals and assumptions of the DDA.
- Contains OL directorate level objectives that are reported to the DDA at Quarterly Planning Conferences.
- Reviewed in draft by D/L prior to final preparation.

MBOs

- Established annually for all OL Staffs and Divisions at the time the Five-Year Plan is updated.
- Separated into three categories: Directorate Level, Office Level, and Division Level.
- Directorate Level MBOs are reported to the DDA quarterly at Planning Conferences. MBOs on the agenda are selected by IMSS in coordination with the DDA/Management Staff and the D/L. Administrative plans for the Quarterly Planning Conferences are made by IMSS. Minutes are prepared by DDA/MS.
- Office Level MBOs are reviewed quarterly at Biweeklies with the D/L, which IMSS attends.
- Division Level MBOs are monitored by the responsible division with no IMSS involvement.

~~SECRET~~

#### PLANNING CONFERENCES

- Attendees are Chief of Divisions and Staffs, D/L, DD/L, EXO/OL, AEO/OL, IMSS Planning Officer.
- Held annually or semi-annually as determined by the D/L.
- 25X1 ◦ Prior to October 1984, the conferences were held [ ]  
25X1 but the D/L has asked that the next conference (March 1985) be held at an outside Agency Facility. The October Conference will be [ ]
- Administrative plans are made by IMSS.
- Minutes/Report on the Conference is prepared by the Assistant Executive Officer.

#### AUDITS

- IMSS is a monitoring/dissemination point for all planned audits and follows up to ensure that audit recommendations receive complete and timely response.

#### ADMINISTRATIVE PLANS

- Reviewed and coordinated by IMSS as received to ensure that adequate logistics provisions and/or a Logistics Annex are included in the operating procedures.

#### EMERGENCY PLAN

- Updated annually (first quarter of fiscal year) or when major changes occur.
- Updates distributed to the DDA for preparation of a Directorate Plan and to OL components.

S E C R E T

SIGNIFICANT ACCOMPLISHMENTS FOR PAST FISCAL YEAR

- Prepared as a result of DDA tasking first quarter of new fiscal year.
- Coordinated by IMSS who writes a paper from input from OL Divisions and Staffs.

MEMORANDUMS OF UNDERSTANDING/MEMORANDUMS OF AGREEMENT

- Reviewed and coordinated as received for impact on OL and proper inclusion of Logistics provisions.
- Keep indexes in each file up to date and a current list of all agreements.

DCI'S ANNUAL REPORT TO CONGRESS

- Coordinated by IMSS in response to DDA tasking first quarter of the fiscal year.
- A report is prepared from input received from Divisions and Staffs.

REPORTS OF SURVEY

- A Survey reports the circumstances surrounding the loss, damage or destruction of government property and makes a recommendation to hold an individual pecuniarily liable or to relieve the individual from responsibility.
- Reviewed, investigated as needed, and report prepared with recommendations for the signature of the Chairman, Headquarters Survey Review Board (C/IMSS) and Board Members.
- The governing regulation on Reports of Survey is   which is currently being revised. The revision is assigned to Smokey.

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25X1

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STANDARD SUPPORT REQUIREMENTS

- Joint effort between IMSS and B&F.
- Action could be to adjust formulas for determining Logistics support to new Agency initiatives and/or to apply the current formulas to new initiatives.
- Tasking normally received from the DDA in the December-January time frame.

OTHER

- Actions are assigned to the Planning Officer that are not generally related to LIMS, ADP, Information Systems, Regulations, and Personal Property Claims.
- Reports OL efforts on DCI's Excellence Campaign.
- Coordinates or conducts all reviews, analysis, actions that cross OL organizational lines.

◦ ~~GRAT~~ Commission

◦  EFFORT

◦ OL QUARTERLY

◦ LOGISTICS FIELD GUIDE

S E C R E T

◦ OL yellow PAGES

ILLEGIB

S E C R E T

CURRENT ACTIONS ASSIGNED TO PLANNING OFFICER

Week of 28 January 1985

- ° Attendance at Biweeklies during which objectives are covered.
- ° Preparation for the upcoming DDA Quarterly Planning Conference scheduled for 13 February, 0930 hours. Dry run is scheduled for 7 February, 1400 hours.
- ° Preparation for OL Planning Conference scheduled for 19 & 20 March at the Sheraton Inn, Fredericksburg, Va.
- ° Review and Indexing of all agreements containing logistical functions with internal agency components and external agencies.
- ° Review of annual reports from the House Permanent Select Committee on Intelligence (HPSCI) and the Senate SelectCommittee on Intelligence (SSCI).

SOLICIT NEW D/L's FEELINGS ON FOLLOWING

- ° His preference for covering Objectives. Does he wish to proceed as is (Coverage at one of the biweeklies each quarter) or change to a different system of reporting?
- ° Should we proceed with the OL Planning Conference for 19 & 20 March? If yes, what does he want the focus of the Conference to be? In addition to soliciting topics from the Chiefs of Divisions and Staffs, Dan had his own plan for topics to cover? The new D/L's plans may require we give additional guidance to the Chiefs of Divisions and Staffs.

S E C R E T

Claim Section

Claims Review Officer - in position over 5 years

Claims Assistant - in position since June 1984 (still in training mode, but doing beautiful)

STAT HCRB Reviews, analyzes, and prepares final recommendations to the HCRB on all personal property claims from Agency personnel world-wide under provisions of [ ] pursuant to the Claims Act.

- Normal processing and adjudication of claims continues (No Specifics)
- Few claims are routine; majority are quite complex and take a great deal of time to investigate, research, process, and adjudicate.
- Increase in requests for advice (phone and written) on settling claims of \$300.00 or less and increase in requests to review unusual losses to see if covered under Claims Act. Such requests often require detailed written responses which take time to prepare.
- Recently addressed Field Admin Course [ ] and Overseas Orientation Program [ ] on subject of claims to better educate our employees and make them aware of the Claims Act, [ ] and proper procedures involved in filing a claim.
- Received 129 claims in 1984  
Processed 116 claims in 1984  
Denied 16 claims in 1984  
Appealed to DDA - 3 claims in 1984
  - 1 - HCRB asked for policy change
  - 2 - DDA upheld HCRB denial

Total reimbursement for 1984 approximately \$116,000.00

MISSION OF THE REGULATORY "SECTION" (Not officially a section)

Ensure that regulations that affect the Office of Logistics are kept current. There are two principal categories of these regulations--those originated by OL and those originated by other Agency components but which affect OL. Generally, we act on the former and react on the latter. These regulations encompass HRs and FRs, HHBs and FHBs, HNs and FRs, and Employee Bulletins at the Agency level; and Logistics Instructions, Logistics Notices, and Logistics Advisory Notices at the OL level.

Our principal projects at this time are:

STAT

☐ Acquisition Handbook -- This 250-page

(double-spaced) handbook revision is in the hands of the Regulatory Policy Division (RPD), OIS, and should be published within a few weeks.

STAT

☐ Real Estate and Construction -- This revision currently being reviewed by OL/RECD. We hope to submit to OIS/RPD within a few weeks.

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☐ Accounting for Lost, Damaged, or Destroyed Property

-- This revision currently is being reviewed by the Audit Staff, who had requested some tightening of controls.



STAT

Type II Accounting Procedures -- This revision will include procedures used by Type II stations that have an automated accounting system. We are holding this temporarily to see if an important change to Type II procedures that we are seeking is approved by the Office of Finance (OF is affected by this change).

LIs -- Many of these are in the process of being revised. We hope to revise all of those more than 3 years old within the year.

Guide for Field Logistics Officers -- Although not a regulatory issuance, we have written a guide for field use, based on the regulations and elaborating on them. It is currently in the printing process at OL/P&PD.

## LIMS OVERVIEW FOR NEW D/L

### GENERAL

STAT -- Booz Allen & Hamilton (BAH)--development contractor--21 people currently working on project [REDACTED]

STAT -- Grumman CTEC--Quality assurance contractor--8 people currently working on project [REDACTED]

-- LIMS to be delivered in 13 segments called work packages (WP).

-- First WP "Electronic Requisitioning" scheduled to be turned over to government 18 March (3 weeks late).

-- Critical Design Review for second Work Package--"Control and Manage Inventory" schedule for 8 March 85.

-- WP's to be delivered at rate of 2 per year through FY 91.

-- BAH has experienced cost growth of \$782K to date--if continues at this rate, estimate BAH cost will jump from \$11M to \$18M.

-- \$6M in financial relief requested from comptroller on 24 January.

-- BAH has until June to prove they can properly manage available resources, control financial expenditures and show they can do the job.

### SPECIFICS

-- Software for WP1 broken down into 16 units. Six units received to date - last due by 18 March.

-- LIMS user Functional Test Staff - consisting of 6 (5 f/t and 1 p/t) OL reps and 1 OF rep preparing and executing test cases on software.

-- Incremental testing on 6 units received to date has surfaced various discrepancies which BAH is correcting.

-- Full acceptance testing will be run for one month--mid March and April.

-- Errors noted will be sent back to BAH for correction.

-- Corrected software will be retested again.

-- After software has successfully completed acceptance test phase, it will be put into parallel operations (POP) mode with current ICS.

-- POP procedures currently being defined. POP will run from mid April--Mid May.

-- LIMS currently scheduled to go operational late May 85.

-- Training begins 15 April for approximately 720 people as follows:

Requestor course	8 hrs.	150 people
Approvers course	4 hrs.	120 people
Editors course	8 hrs.	190 people
B&F approval course	4 hrs.	120 people
Managers overview course	2 hrs.	140 people
		<u>720</u>

-- SSA/DDA Staff Meeting & DDI support officers briefed.

-- Numerous offices visited to describe LIMS and ascertain if problems anticipated.

-- Input of requests that cannot be accomplished by customers will be done by OL part-timer.

-- Recruitment of six GS-7 part-timers began in August 84--only one on board--no others yet scheduled for polygraphs.  
A Potential Problem.

## DATA ADMINISTRATION SERVICE

I. The purpose and intent of the Data Administration Service is to provide a focal point for, and management of, automated information processing systems, projects and programs within OL. Six key objectives are:

- To effectively develop and manage OL ADP resources in support of OL needs.
- To review ADP and word processing requirements, identify equipment needs, establish project priorities, coordinate planning activities; respond to word and data processing initiatives on a timely basis.
- To support the planning, implementation and use of an operational LIMS system.
- To provide for the training of systems users, using a specific and timely curriculum.
- To assure that ODP technical support is provided to the Data Administration Service and that it is shared throughout OL.
- To provide a rewarding career path for those OL personnel having a special aptitude for and interest in automated data processing.

## II. Current DAS activities/issues.

- Complete DAS reorganization plans; acquire final approval.
- Prepare for PMCD re-survey.
- Finalize DAS staffing; fill (5) vacancies; hire P.T. personnel.
- Complete Wang/ODP equipment survey; monitor Wang and ODP equipment installations.
- Investigate Page/Headquarters data link response capabilities.
- Enhancement of ASAPS.
- LOCS development/deployment.

## III. LOCS MBO

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LOCS (LOGISTICS OVERSEAS COMPUTER SYSTEM)

- Initiated July 1983 with query on interest in computers and their potential applications sent to 12 major overseas Log offices [REDACTED]
- Positive responses received. Common interest in an accountable property system and an inventory control package. Some respondents pinned hopes on eventual use of Wang/CRAFT facility.
- Wang/CRAFT (Alliance) is not suitable for large data bases--especially field version of ASAPS (lack of audit trail). PC hardware and CONDOR DBMS software chosen and developed by TG/DAS/IMSS.
- First installation completed at remote site, using IBM PC, January 1984. Very successful, still in operation.
- Switched to Wang PCs for compatability with field Wang installations, easier maintenance and OC's intention to use same type of PC as communication controllers.
- Security, site and cleared personnel are issues. Accountable property feature contains classified data; inventory control does not. [REDACTED]
- PC package contains terminal, hard disk (floppies can't be used due to capacity and number of records) and printer. Necessary Tempest-approved hardware now becoming available.
- Second test site is AMCA, now using a partial (unclassified) system. EUCA will be third site (within next three months).
- With the availability of Tempest equipment AMCA, EUCA and other stations can use complete system (3rd and 4th quarters, FY 85).
- Wang (not CONDOR) word processing feature will become available also. Hopefully, no need to customize a particular installation's software--thus standardization can be achieved.
- A "layman's" User Manual is being developed. TG/DAS will install system at each site and provide initial training. OC is very supportive in terms of hardware maintenance, repairs, spare parts.
- Hardware package cost greatly reduced by "piggybacking" on OC's Wang PC large quantity purchase--about \$7800 for three equipment items: terminal, hard disk & printer.

Declassified in Part - Sanitized Copy Approved for Release 2013/09/04 : CIA-RDP94-00896R000200140008-3

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